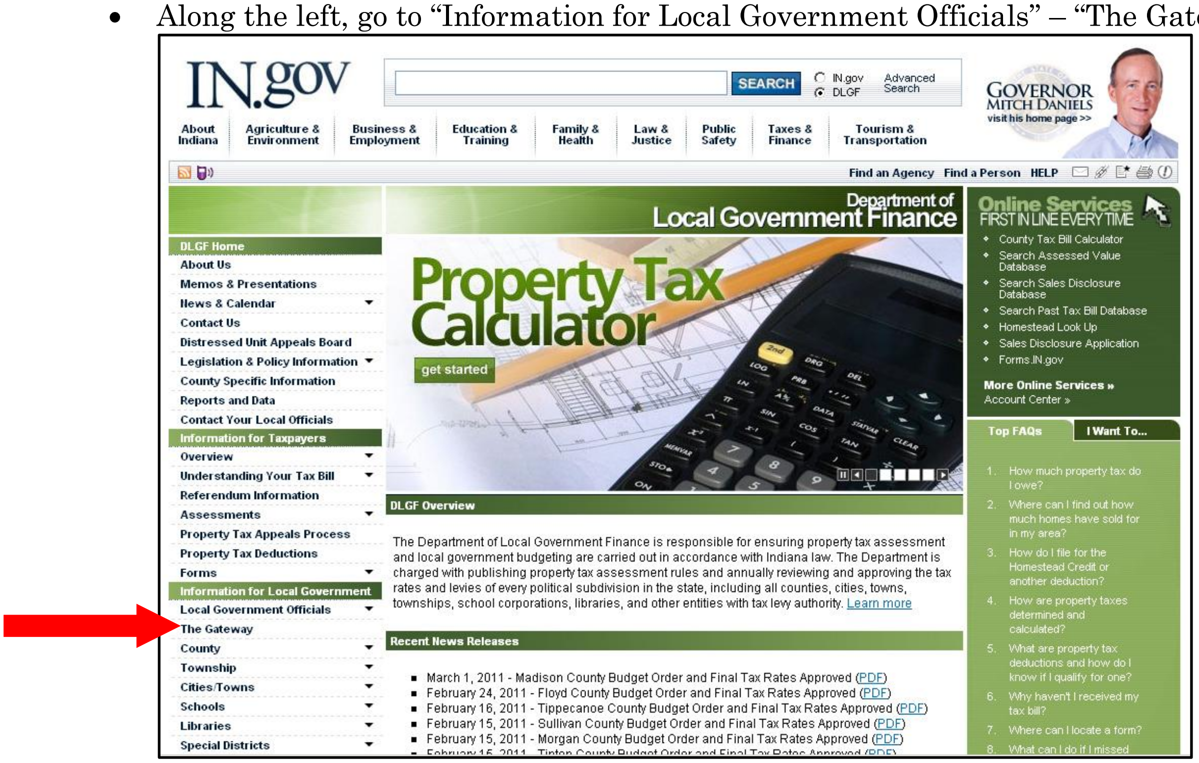
Gateway Live Demo

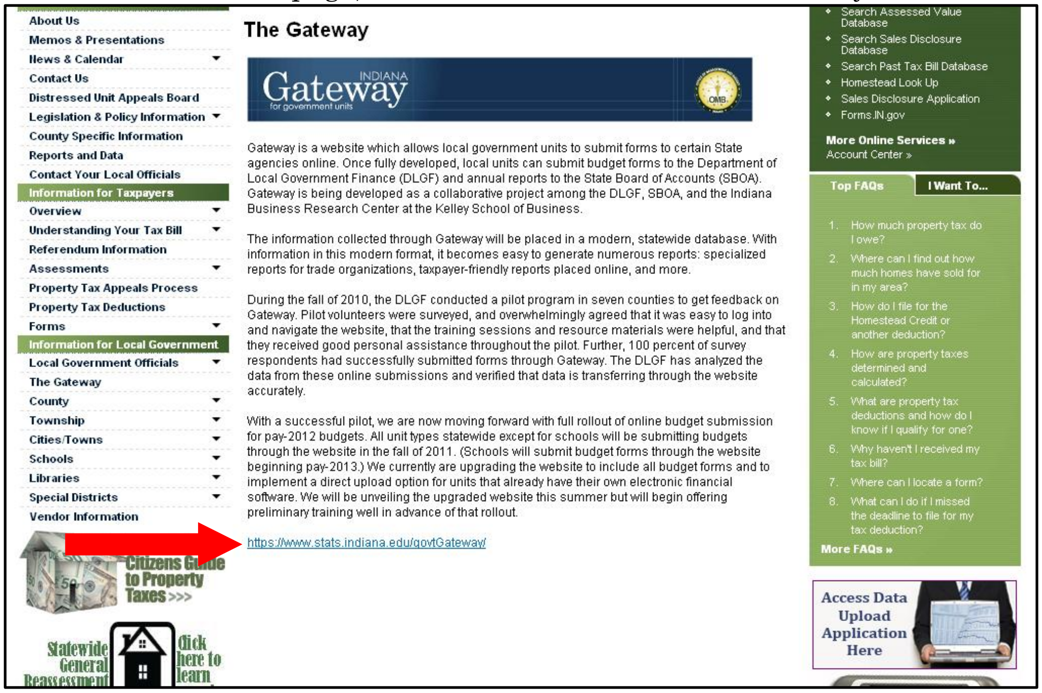
Getting to the Gateway website from the Department website

- Begin with www.in.gov/dlgf

- Along the left, go to “Information for Local Government Officials” – “The Gateway”

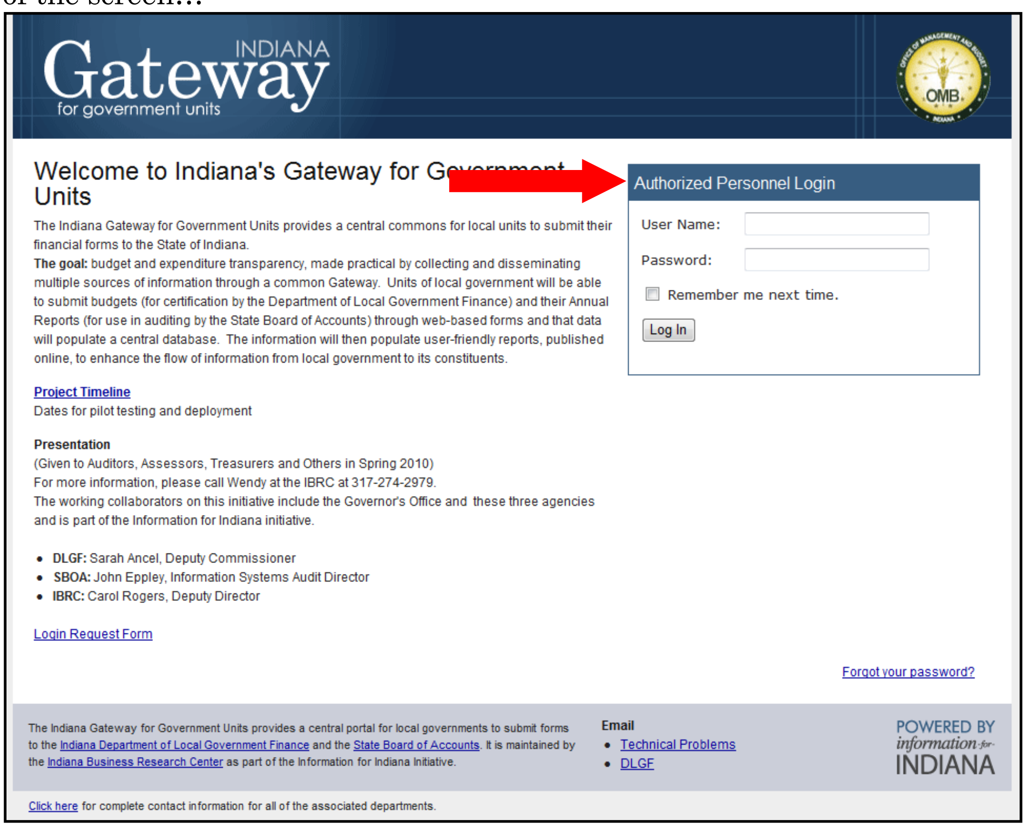


- At the bottom of this page, click the URL to link to the Gateway.



Logging in and changing password

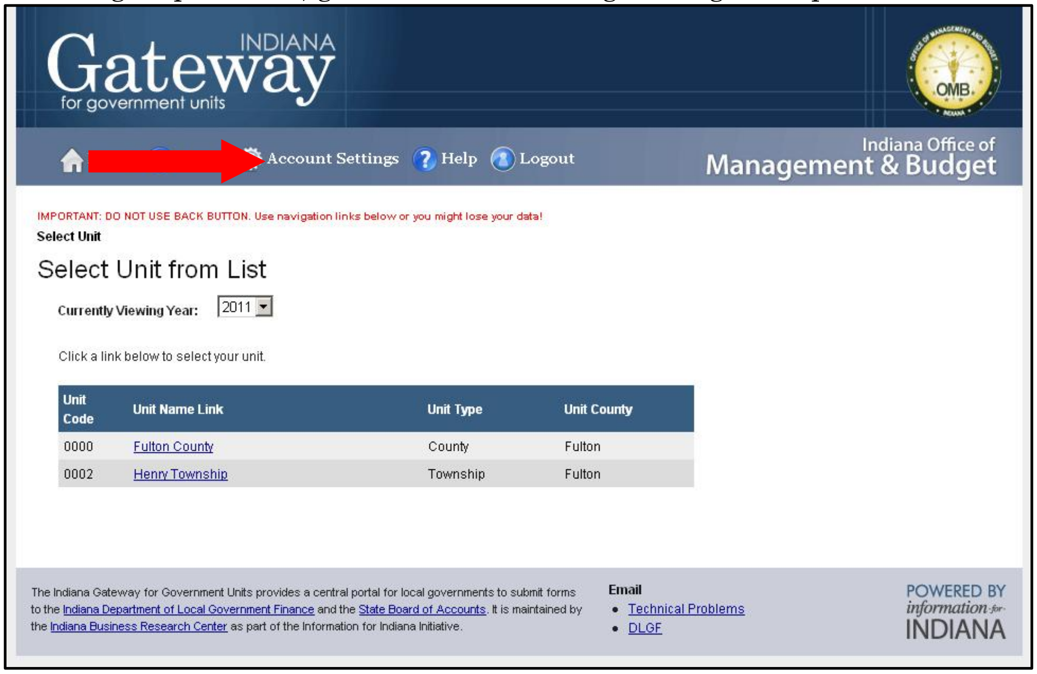
- Depending on your screen resolution, the login box will appear either at the top right of the screen…



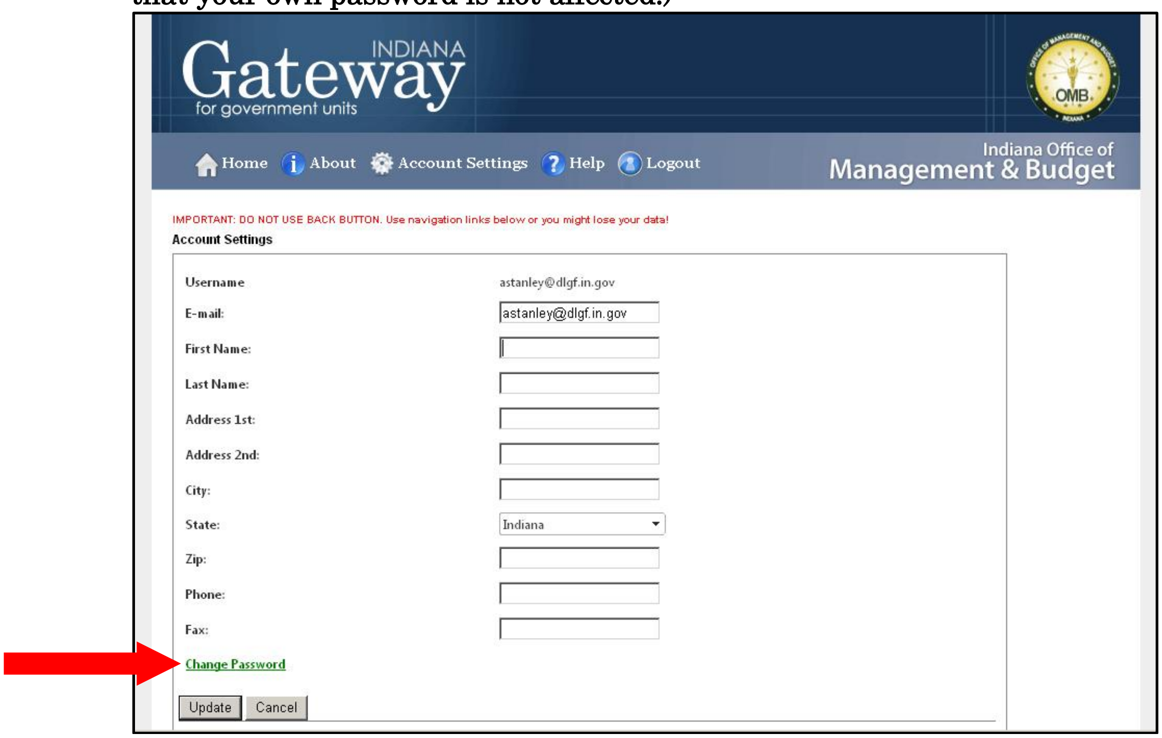
…or at the bottom after the text.

- Type in your User Name (your e-mail address) and your password.
    - *Tip to Share: Clicking the "stay signed in" box will allow you to bypass this screen the next time you visit the website.*

- To change a password, go to “Account Settings” along the top of the screen.



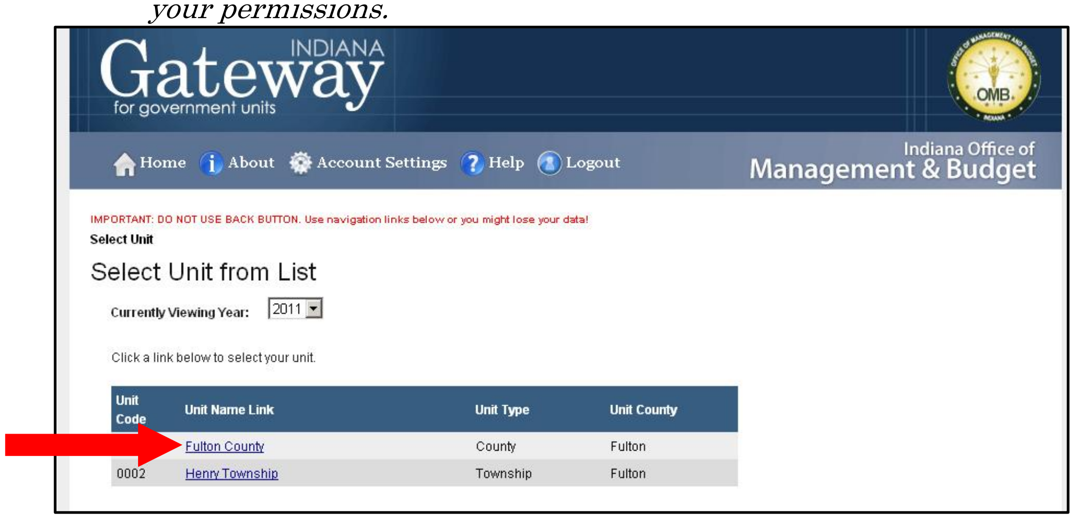
Scroll down to the “Change Password” link. Type in and confirm the new password. **(When doing a demo, navigate to this screen but then cancel instead of updating so that your own password is not affected.)**



- For a forgotten password, there is a place on the log in screen that will allow you to reset the password. Simply click the "Forgot your password?" link and then enter your e-mail address.

Selecting unit

- This task is straightforward. Simply click on the unit that you would like to work on.
    - *Tip to Share: Most people will only see one unit when they log in. The exception is any person who has received permission from the official to enter the Gateway on his or her behalf. Examples of this might be financial advisors with multiple clients or county auditors who have agreed to assist multiple units.*
    - *Tip to Share: If the unit you need to work on is not in the list, you can contact the Department (gateway@dlgf.in.gov) and we will add that unit to your permissions.*



Navigating within the Gateway

- The "back" button on the browser is not a good way to navigate the website. At times, it will work, but others, it will cause the page to expire. A better way to navigate is to use the "breadcrumbs" at the top left of the page.

    - *Tip to Share: Users should always navigate using the breadcrumbs. However, if the "back" button is clicked accidentally, most of the time the user can return by clicking the "refresh" button on the browser.*
- **(When doing a demo, click the "back" button. If it causes the page to expire, hit "refresh" on the browser and continue. Then show how to use the breadcrumbs to navigate instead.)**

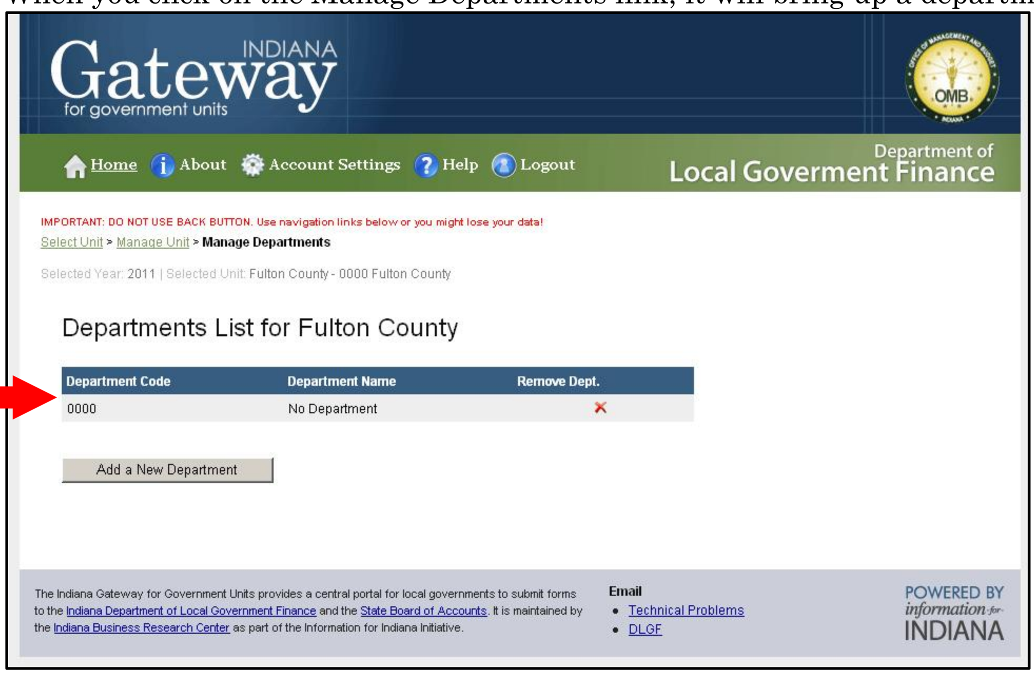
Manage Unit

- The "Manage Unit" screen is where you do unit-level tasks, such as customizing department lists and fund lists, and submitting advertisements and
  - *Tip to Share: Notice that from this screen, you can access both DLGF tasks and SBOA tasks. So, you only have to remember one website, one user id, one password, in order to do reporting to these agencies.*
  - *Tip to Share: With the SBOA reports in the same screen, you can easily check your actual expenditures from last year while working on your budget for the upcoming year.*

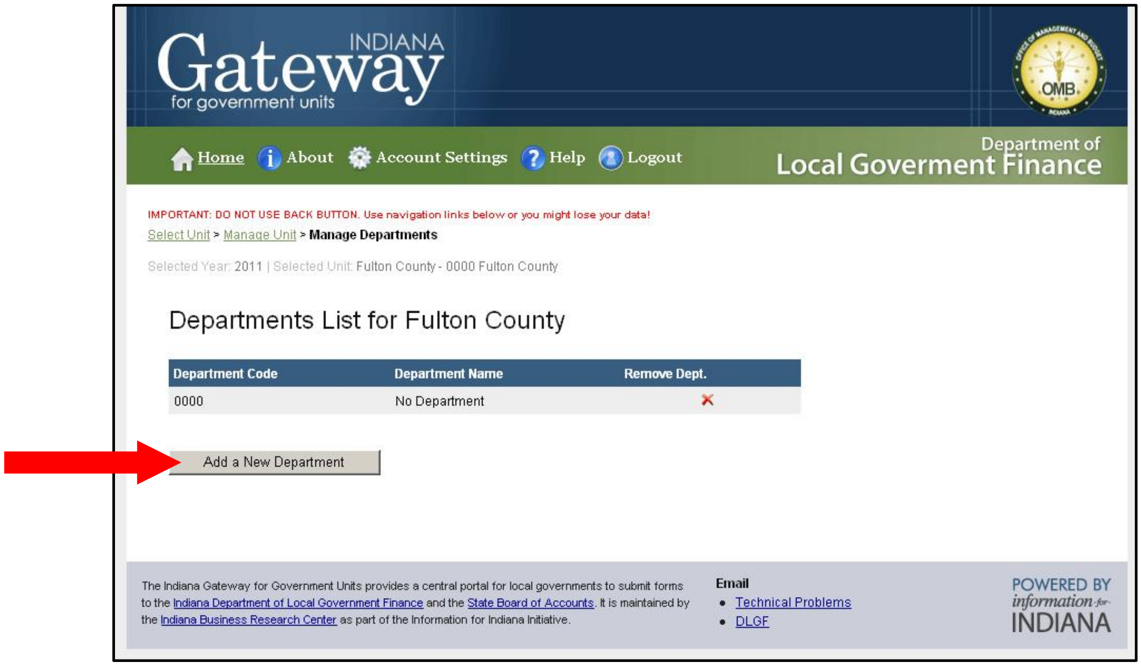
Manage Departments

- This task should be completed first. The Department list that you customize will be used later when determining which forms need to be completed.

- When you click on the Manage Departments link, it will bring up a department list.



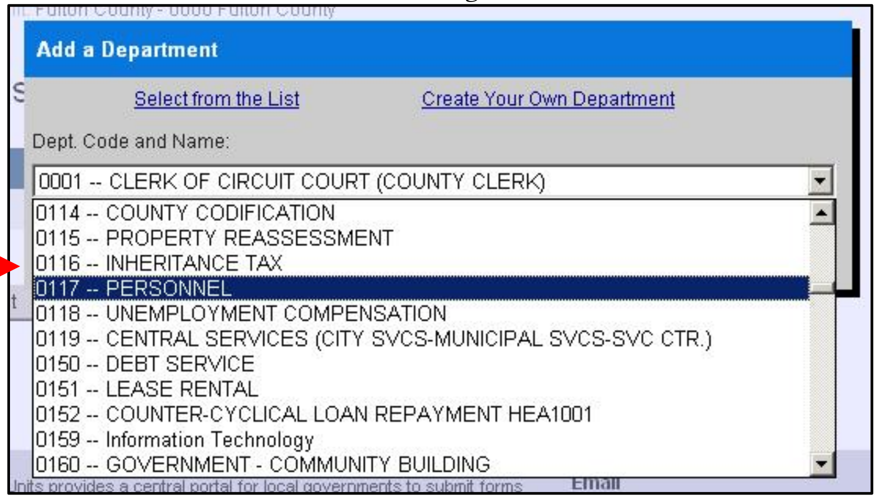
- If an additional department is needed, click the "add a new department" link at the bottom of the list.



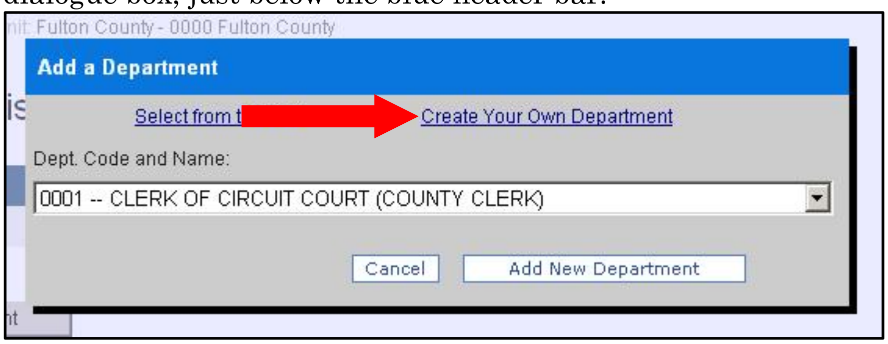
You have two options here.

- "Select from the List" is the default. For this option, the department can be selected from a drop-down menu.

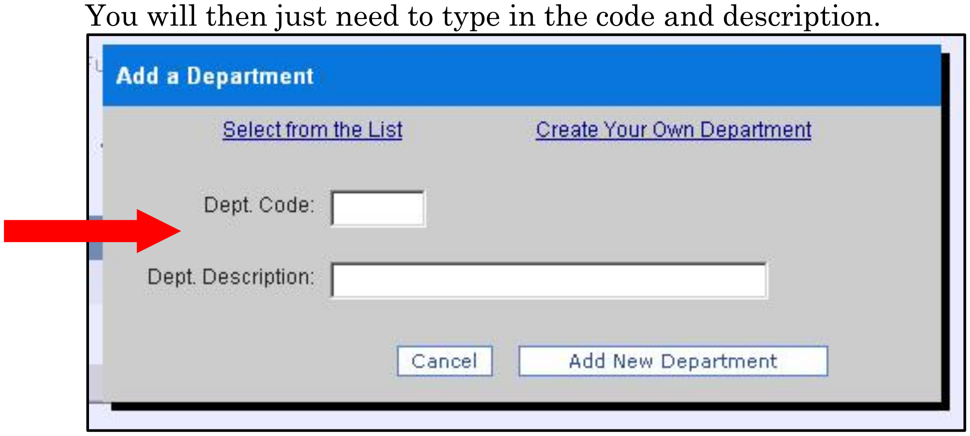
- *Tip to share: The list is sorted by department code, not alphabetically, so if you know the department code before adding the department, it will save some time with searching.*



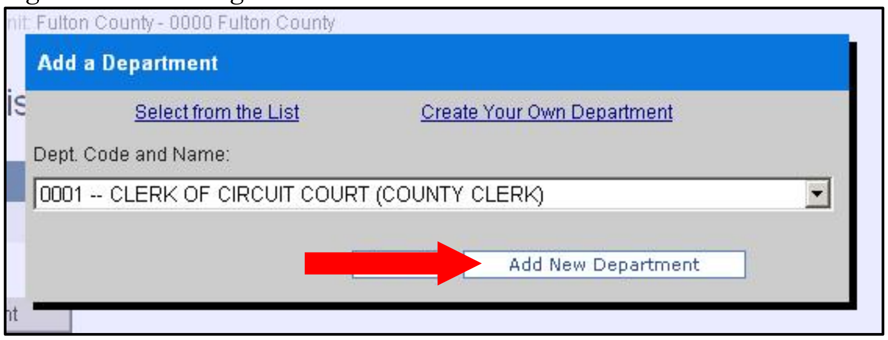
- "Create Your Own Department" is the alternative. You can do this by clicking the "Create Your Own Department" link at the top right of the dialogue box, just below the blue header bar.



You will then just need to type in the code and description.

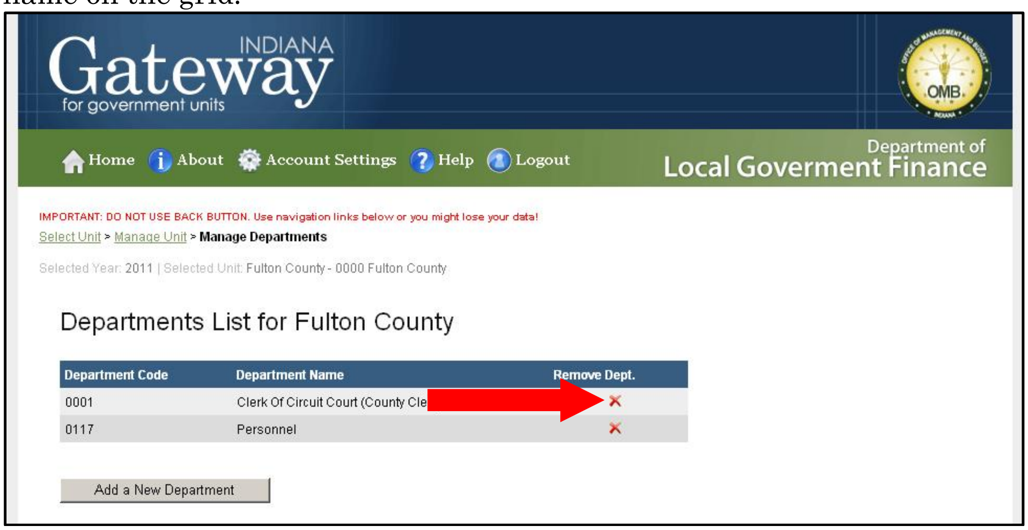


- When you have selected the department you would like to add through either of these methods, add it to the list by clicking "add new department" at the bottom right of the dialogue box.

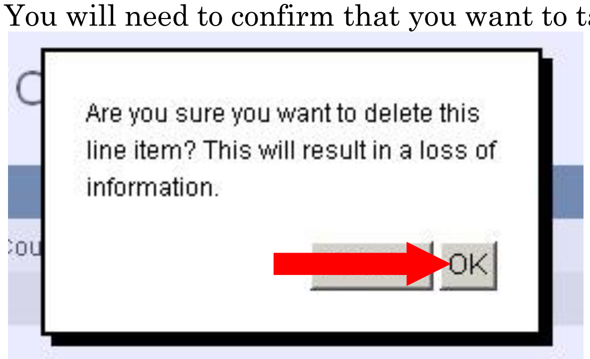


(When doing a demo, add one department using the list, and another through the custom option.)

- If a department needs to be deleted, click the red "x" to the right of that department name on the grid.



You will need to confirm that you want to take this action.



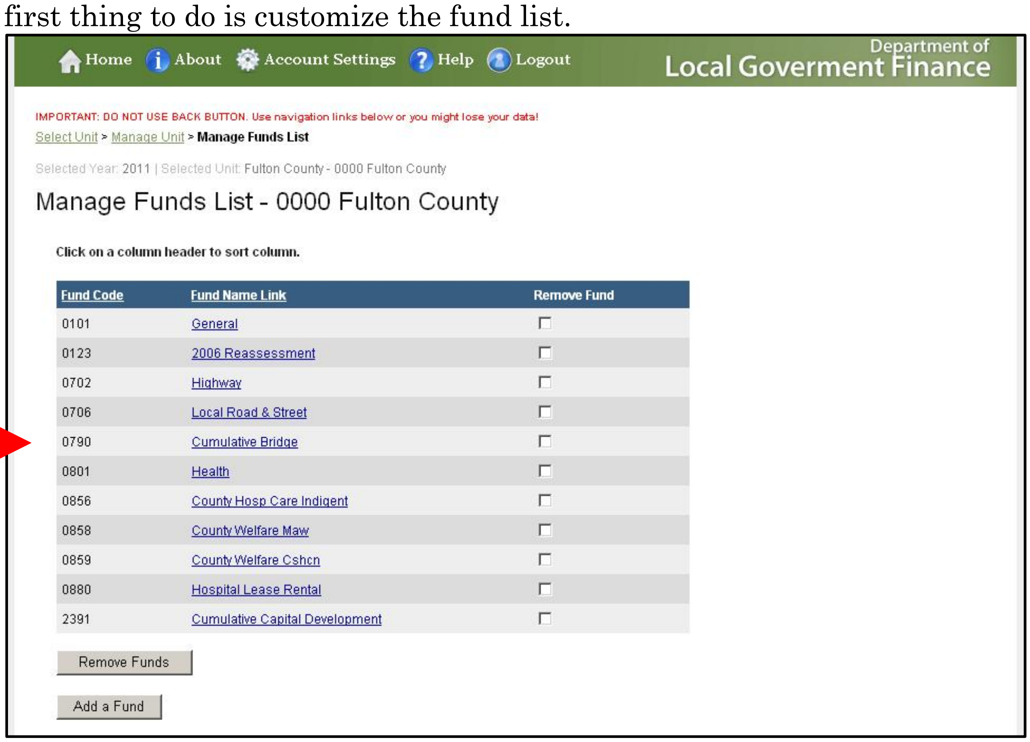
(When doing a demo, delete both of the departments that were just added. After this, use the breadcrumbs to return to the "manage unit" screen.)

Manage Funds and Enter/Edit Budgets

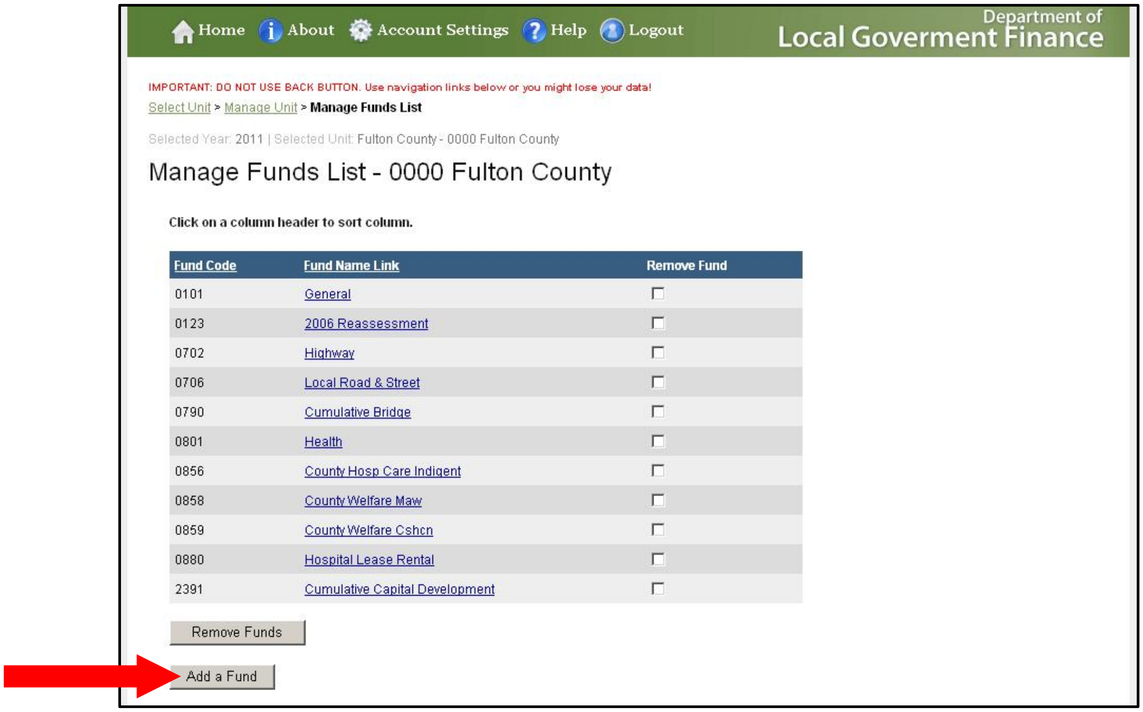
- This portion actually has two functions. First, you customize the funds list. Then, you edit and submit forms.

Manage Funds

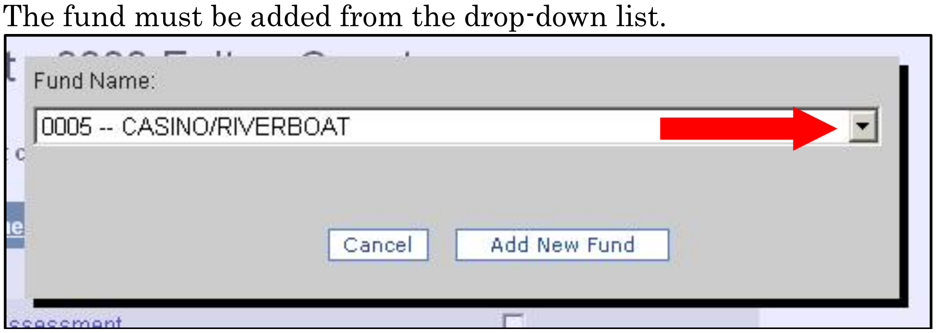
- Clicking “Manage Funds and Enter/Edit Budgets” will bring up a list of funds. The first thing to do is customize the fund list.



- If an additional fund is needed, click the “add a fund” button at the bottom of the list.



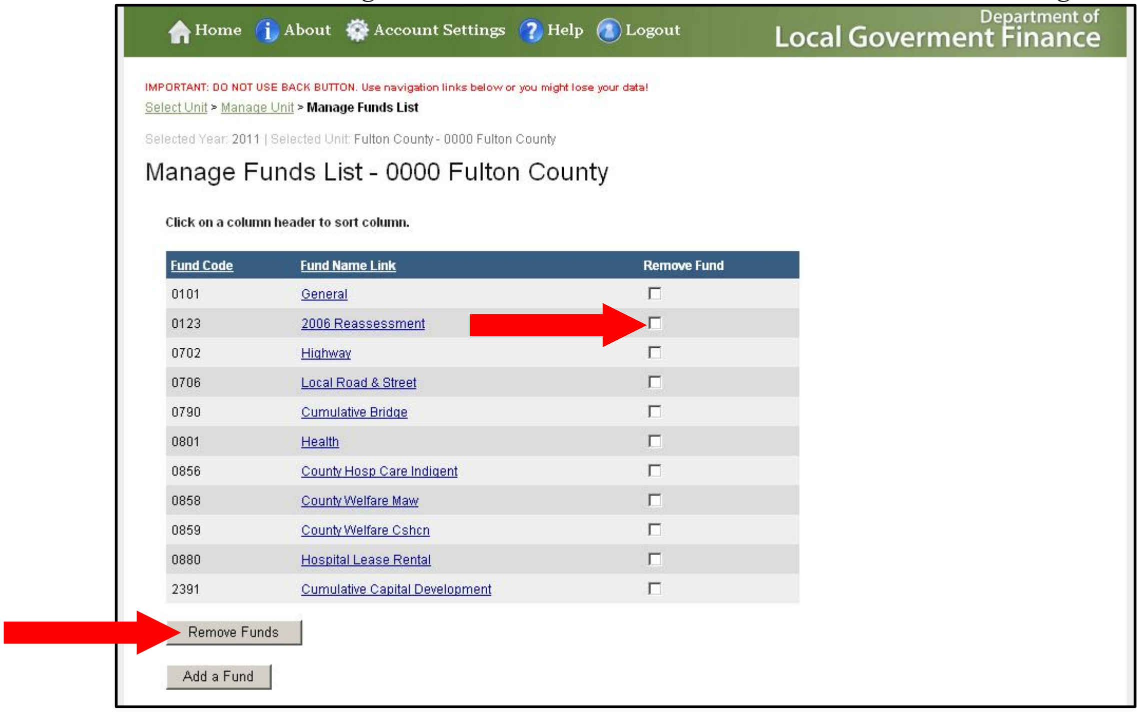
- The fund must be added from the drop-down list.



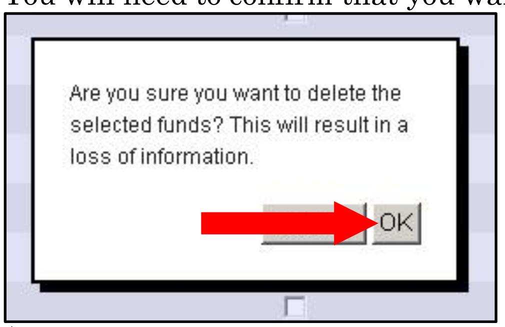
   - *Tip to share: Unlike departments, the Gateway does not permit you to add a fund code that you have customized. This is important to ensure consistency of fund codes. If you need a code that is not on the list, you may contact the Department to get the new code assigned.*

     (When doing a demo, add one fund using the list.)

- If a fund needs to be deleted, click the “remove fund” check box to the right of the fund name on the grid and then click “remove funds” underneath the grid.



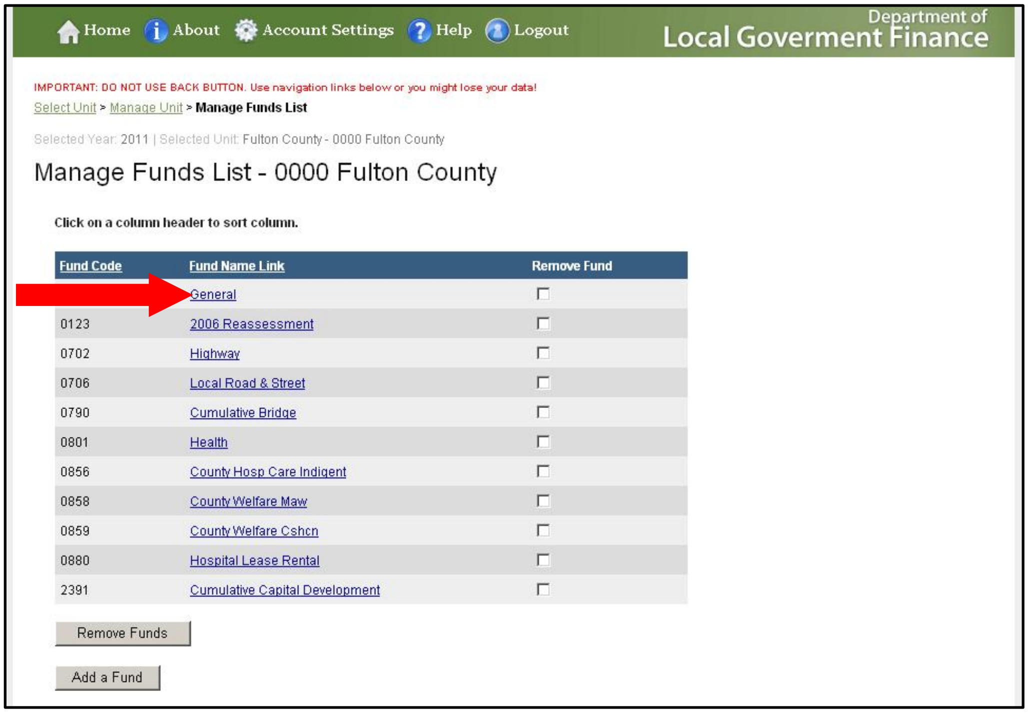
You will need to confirm that you want to take this action.



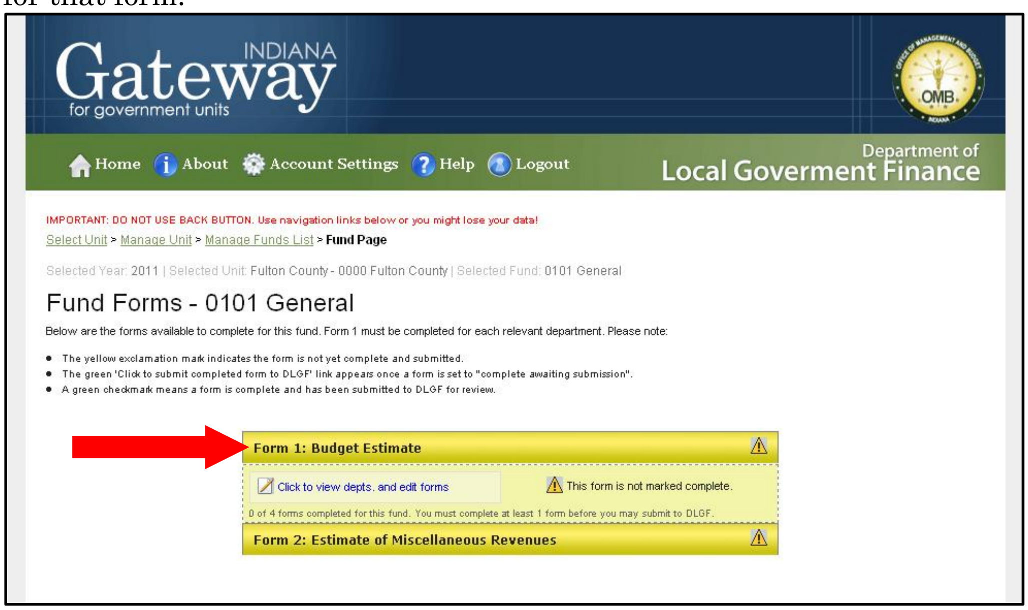
(When doing a demo, delete the fund that was previously added.)

Enter/Edit Budgets

- Once the fund list is customized, you will access the budget forms by clicking on the link for that fund.



- This will bring up a list of forms that need to be completed. This list is set up in "accordion style" which means that clicking on a row will expand out a set of options for that form.

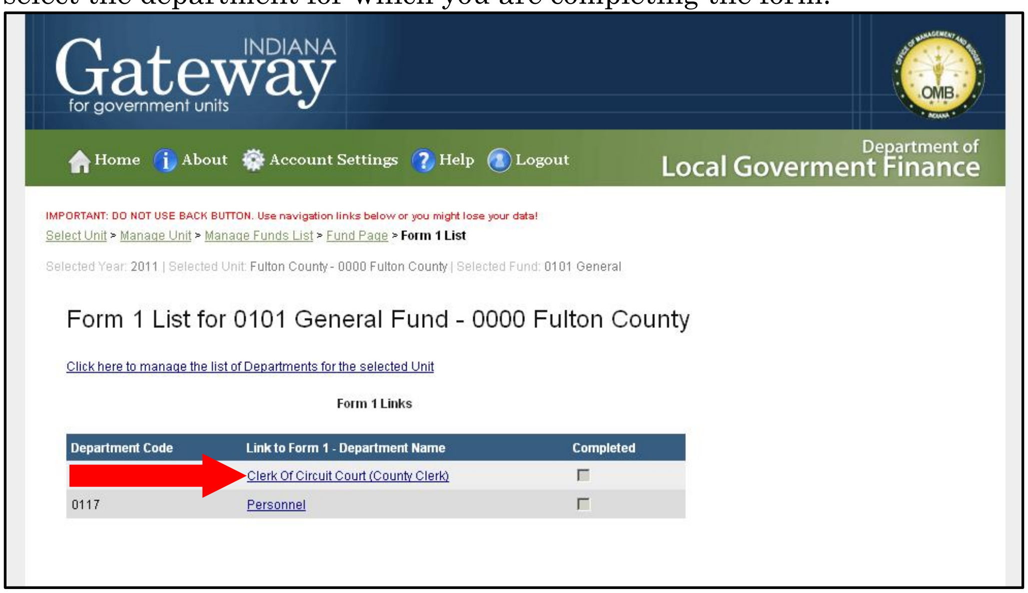


(When doing a demo, click on the different forms to show how the options appear and disappear.)

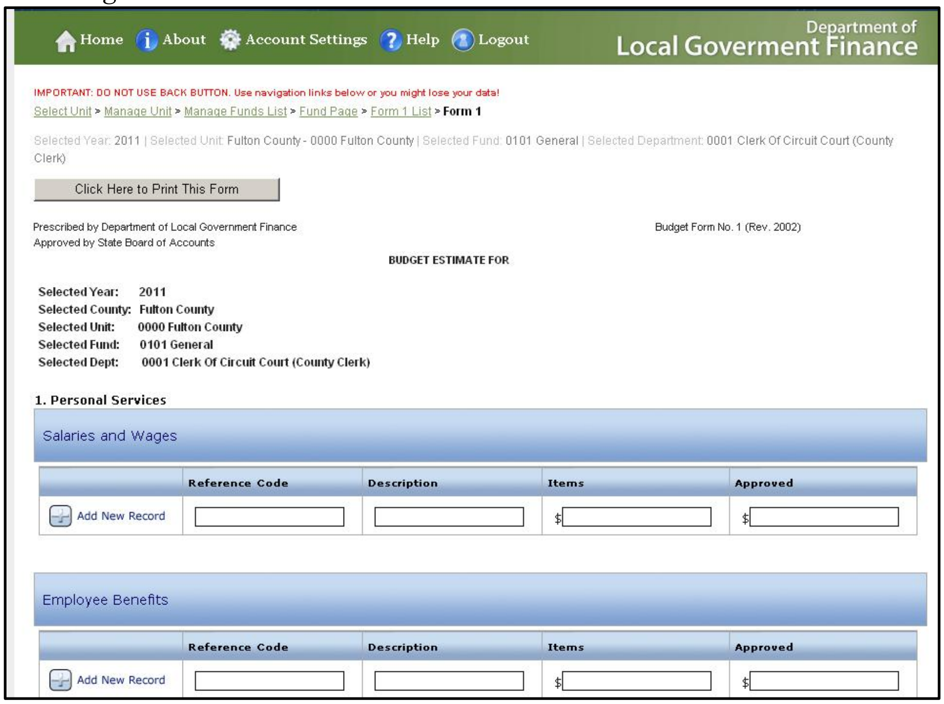
- *Tip to share: This accordion style organization will be very helpful when we have 7 or 8 forms to choose from.*

- To begin entering data into the form, click the option on the left under the header bar.
    - For any form that is departmentalized, this will say "click to view departments and edit forms."

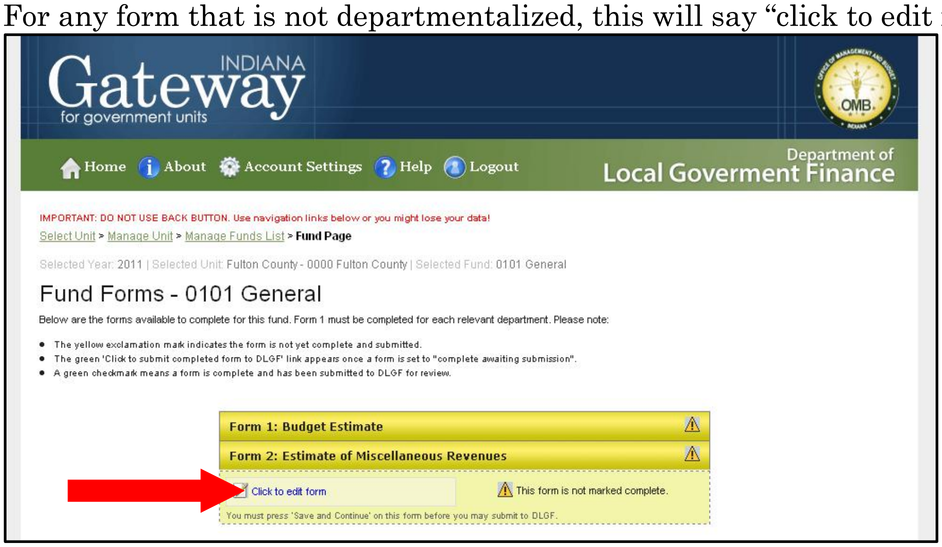
You will first be taken to your customized department list and will need to select the department for which you are completing the form.



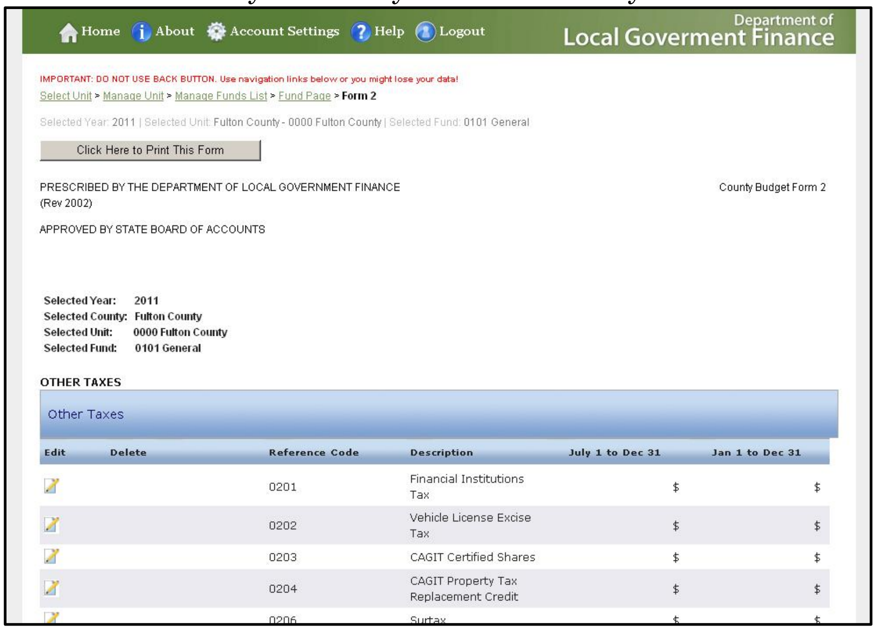
Once the department is selected, you will be taken to the form and can begin entering data.



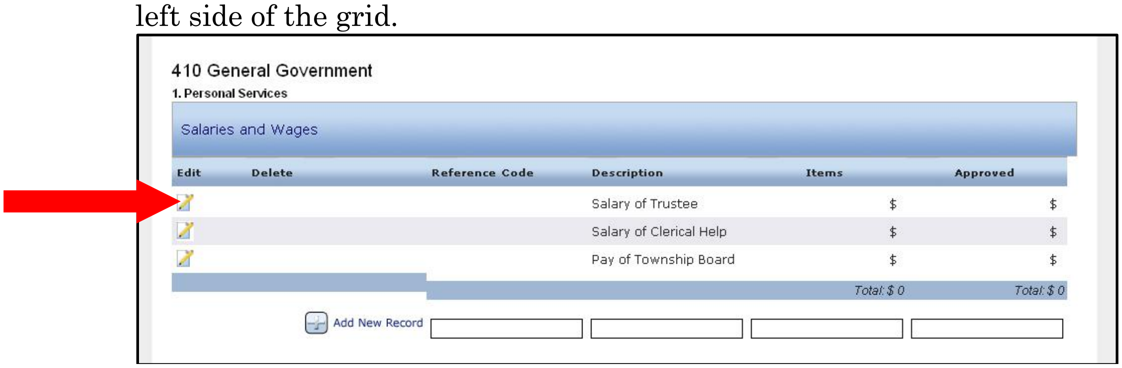
- For any form that is not departmentalized, this will say "click to edit form"…



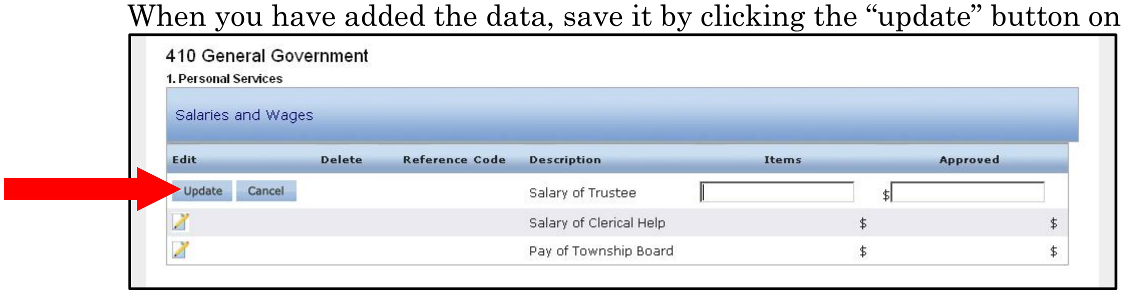
…which will take you directly to the data entry screen.



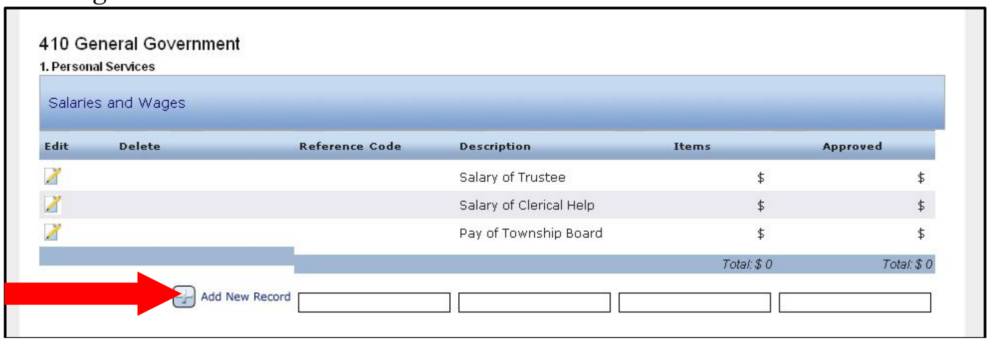
- When you enter the Form 1, you will see that there are a number of categories already listed. These are the standard line items that are listed on the paper version of the form. You may add data to these by clicking the "edit" icon on the far left side of the grid.



When you have added the data, save it by clicking the "update" button on the left.



- For items that you would like to enter that are not standard line items, data may be typed in the blank fields at the bottom of any section and added to the form by clicking "add new record."



- Form 2 contains the same navigation and entry logic.
- **(When doing a demo, the following steps are suggested: Open Form 1. Click the edit button and enter data in a standard line item. Demonstrate that after the data has been entered, it can be edited; do this by reopening the same item and deleting the data you just entered. Then add a custom line item and later delete it.)**
    - *Tip to share: You cannot delete standard line items, but you can leave them blank. If you customize a line item, you can delete that entry entirely.*

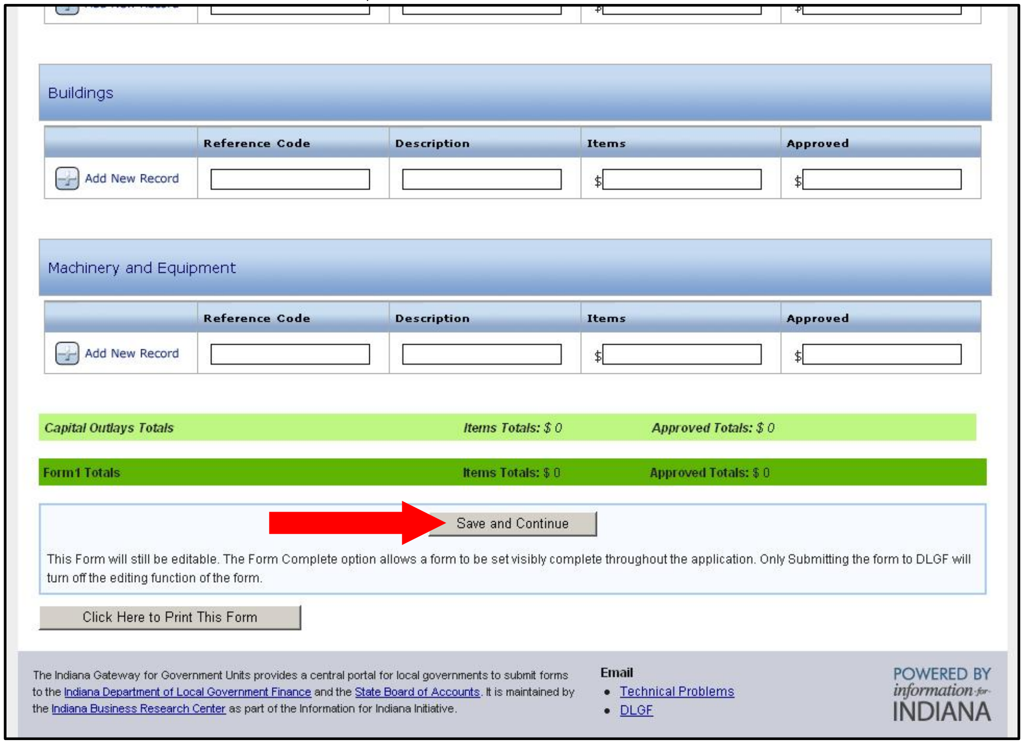
Printing the Forms

- Each form has a print option at the top and bottom of the screen that says "Click here to print this form." If the form does not print the way you expect it to, please consult the section of the Quick Starts Guide that gives some options on your browser that may help to correct the issue.

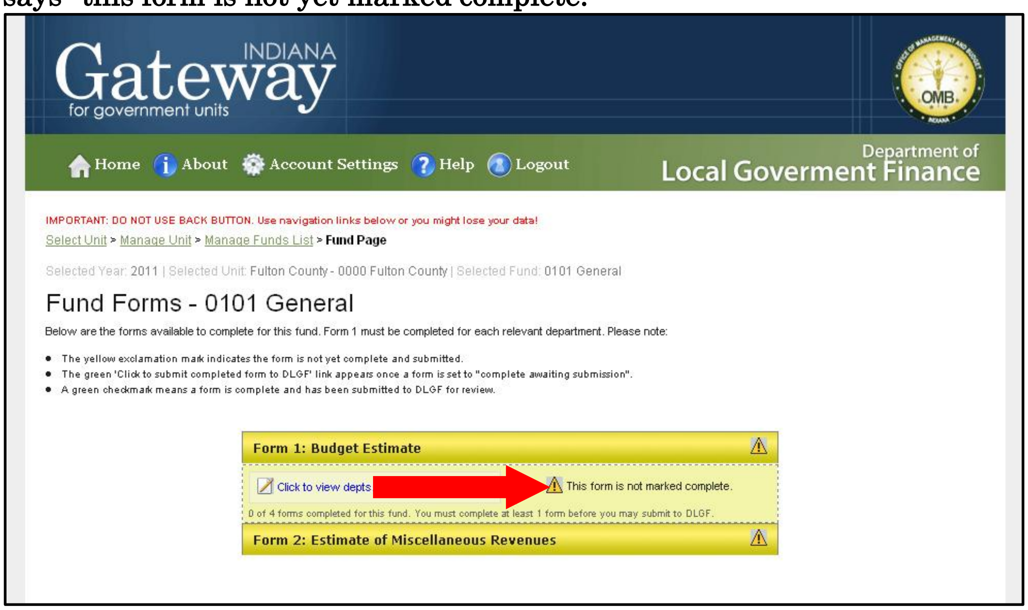
- **(When doing a demo, click on the print button and demonstrate how the print dialogue box appears and what you would do to finalize the print job.)**

Submitting the Forms

- Once all data has been entered on the form, click the button at the bottom that says "Save and Continue." This tells the Gateway that the form is ready for submission. Until this button is clicked, the form cannot be submitted.

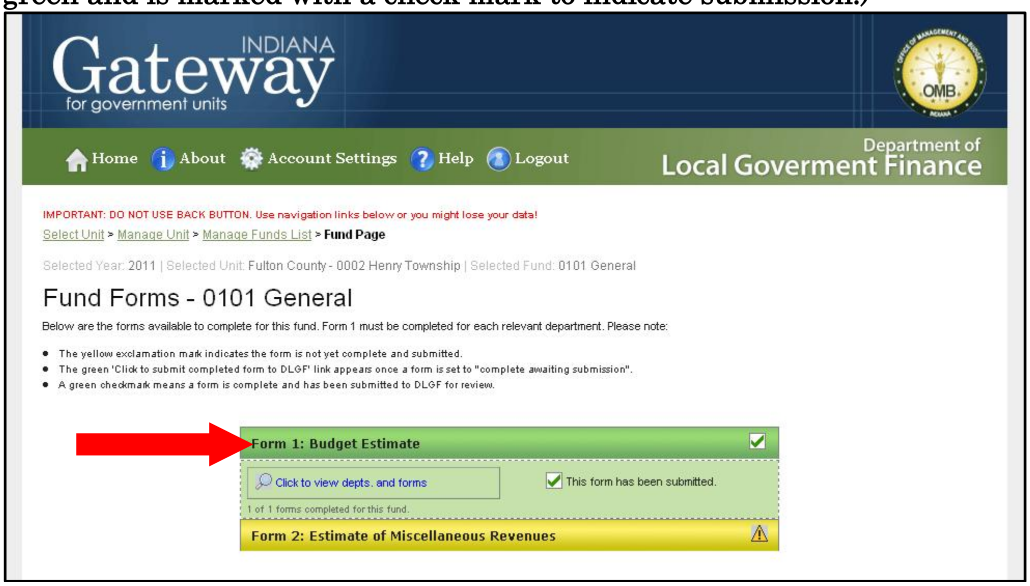


- (When doing a demo, before clicking this button, show how the funds page message says "this form is not yet marked complete."



Then, go into the form, click the "save and continue" button, and then show how the funds page message says "click here to submit completed form to DLGF.")

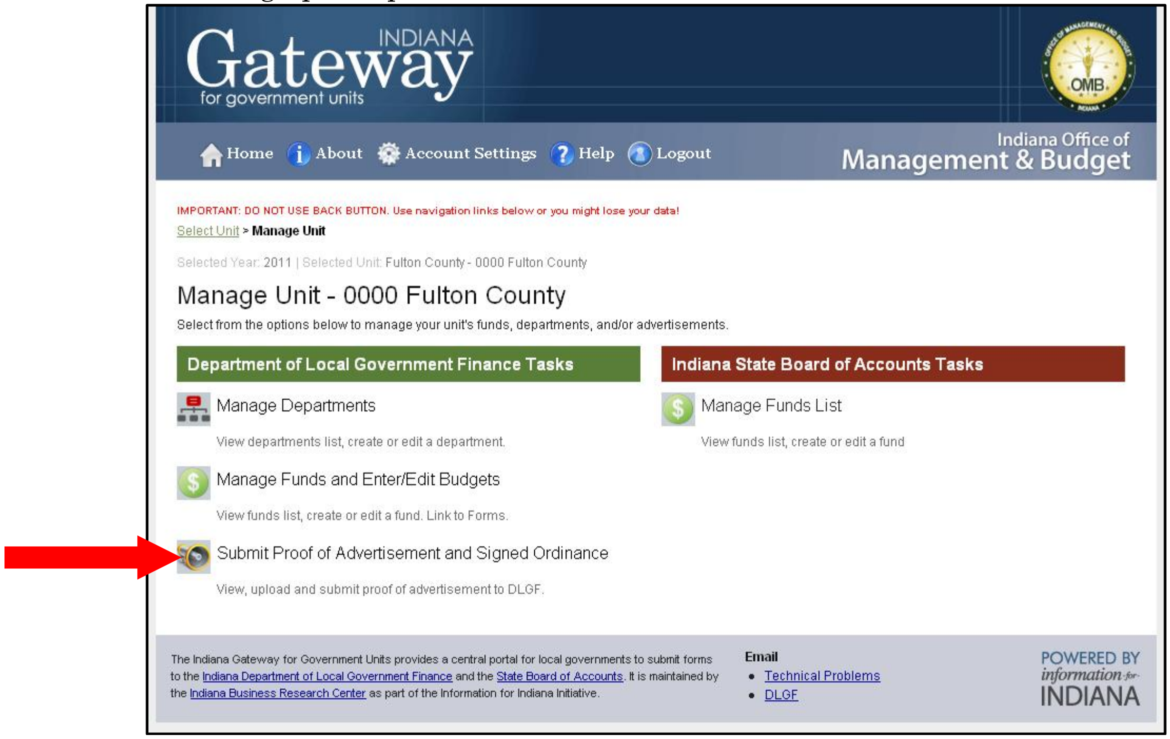
- Once the form has been saved, the option appears in the "accordion" to submit the form to DLGF. It says "click here to submit completed form to DLGF." Simply click this link, and the form has been submitted.
- **(When doing a demo, click the "Save and Continue" button, go back to the accordion, click to submit, and then point out how the accordion bar has changed colors to green and is marked with a check mark to indicate submission.)**



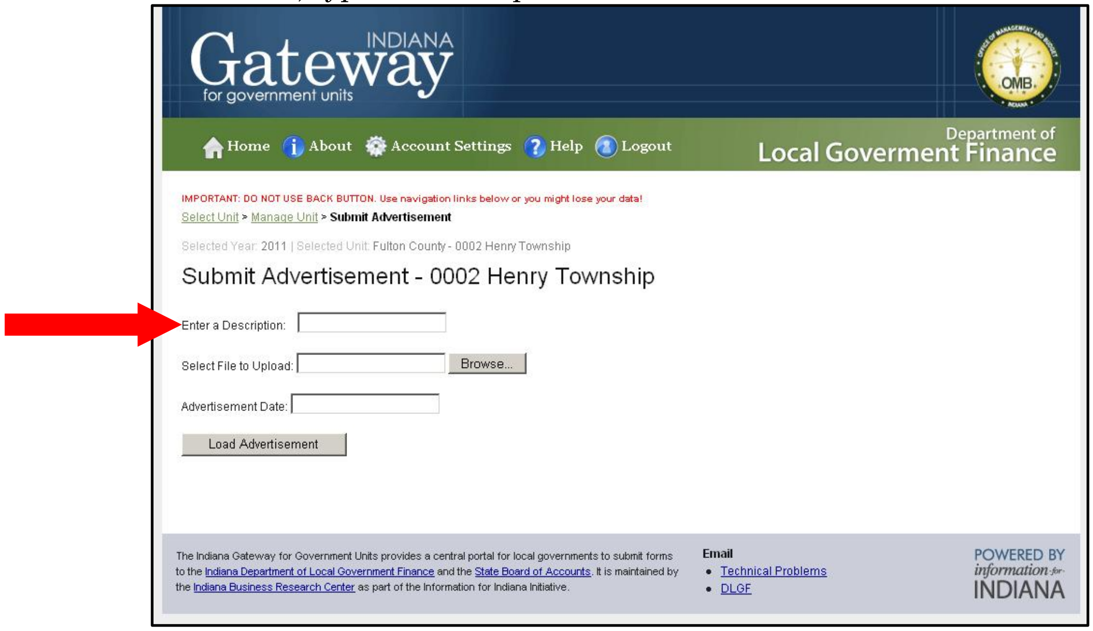
Submitting Proof of Advertisement and Signed Ordinance

- Two documents will need to be submitted as files instead of through the web form. These are the proof of advertisement/affidavit and the signed copy of Form 4 (ordinance of appropriations).
- This file upload can accept any type of file (PDF, picture file, etc.)
- Currently, the pilot version of the website is only set up for the first of these options.

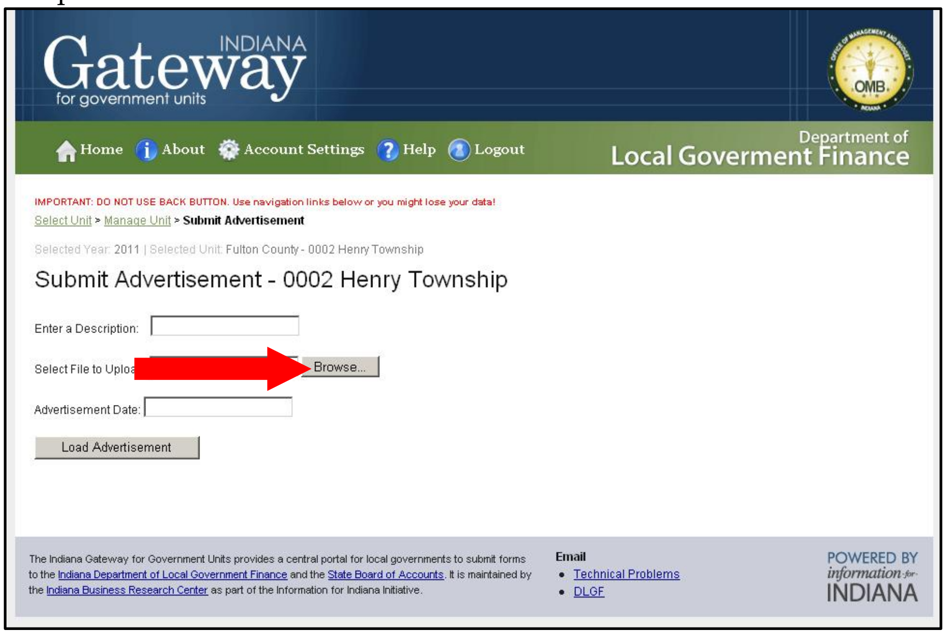
- To upload proof of advertisement, click on the link from the manage unit page. This will bring up an upload area with three fields.



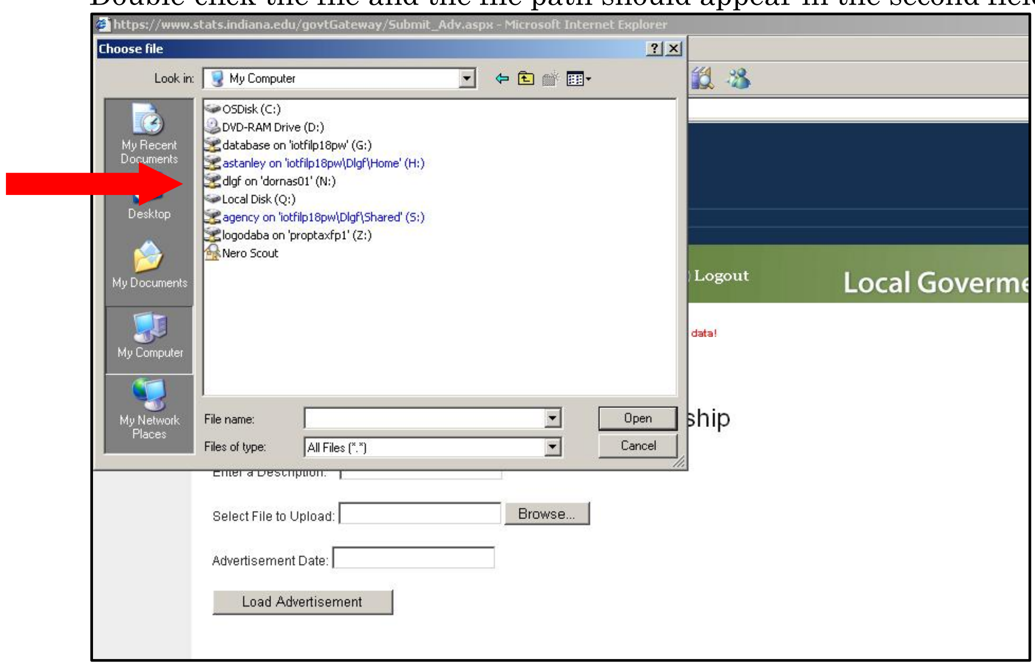
- In the first, type the description of the advertisement.



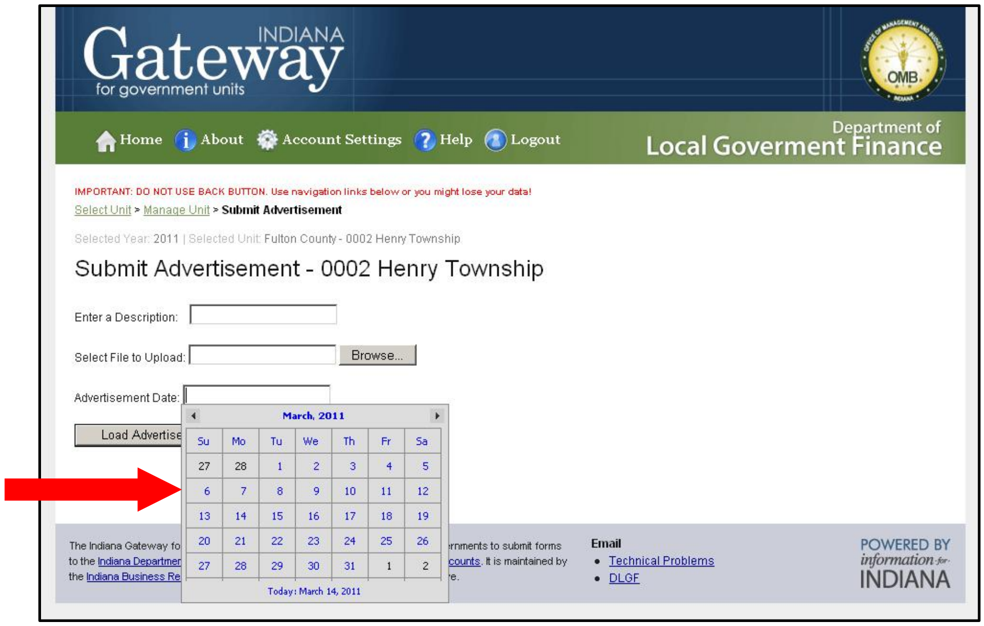
- In the second, click the “browse” button and then locate the file on your computer.



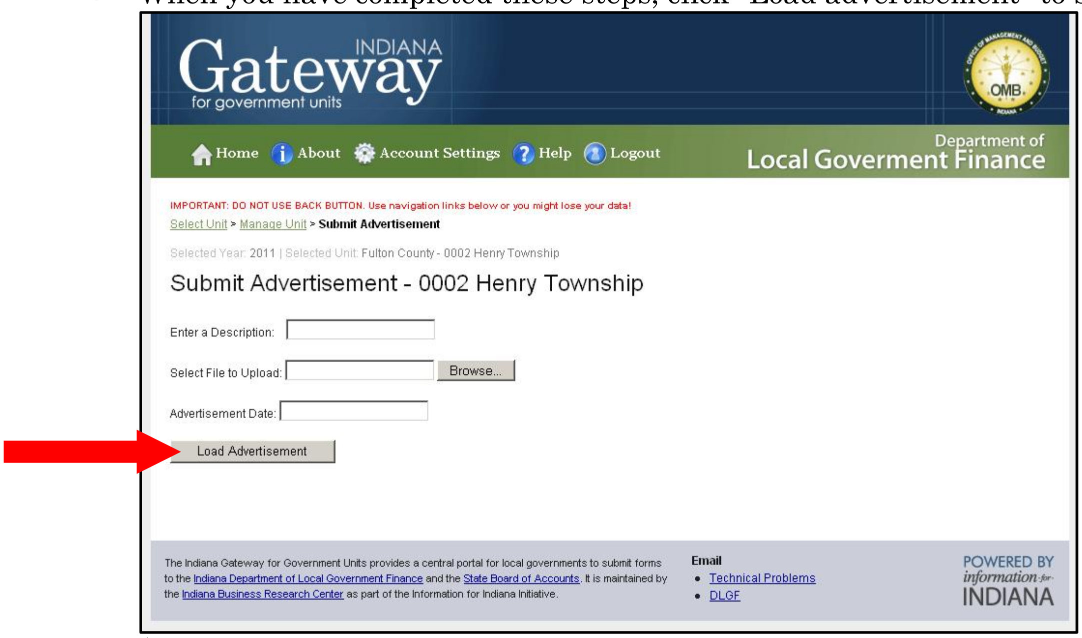
Double-click the file and the file path should appear in the second field.



- In the third, click the field and a calendar will appear. Select that date that the advertisement ran.



- When you have completed these steps, click "Load advertisement" to submit.



- **(When doing a demo, walk through these steps, through uploading the file. However, it is best to label it "test" or "fake.")**

End of Demo – Questions?